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ABSTRACT

In 1985 the Arizona Legislature established a 5-year Career Ladder Program for teachers. The purpose of the pilot is to determine if student academic achievement is enhanced through recognizing and developing high levels of teacher performance and through a "promotion system based on comptence". The overall research and evaluation component, which was a formal part of the legislation, is being conducted by the Center for Excellence in Education at Northern Arizona University. This document explains the evaluation, research methodologies, designs, models and impact which this teacher-incentive program is having on staff development and improved student outcomes. In addition, it provides actual examples of "action research & program designs" in one of the pilot districts. References are included. (JD)

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RESEARCH FINDINGS ON EFFECTIVE PROGRAM DESIGNS AND METHODOLOGIES

Evaluating State and Local Program Impact on Professional Development and Improved Student Outcomes

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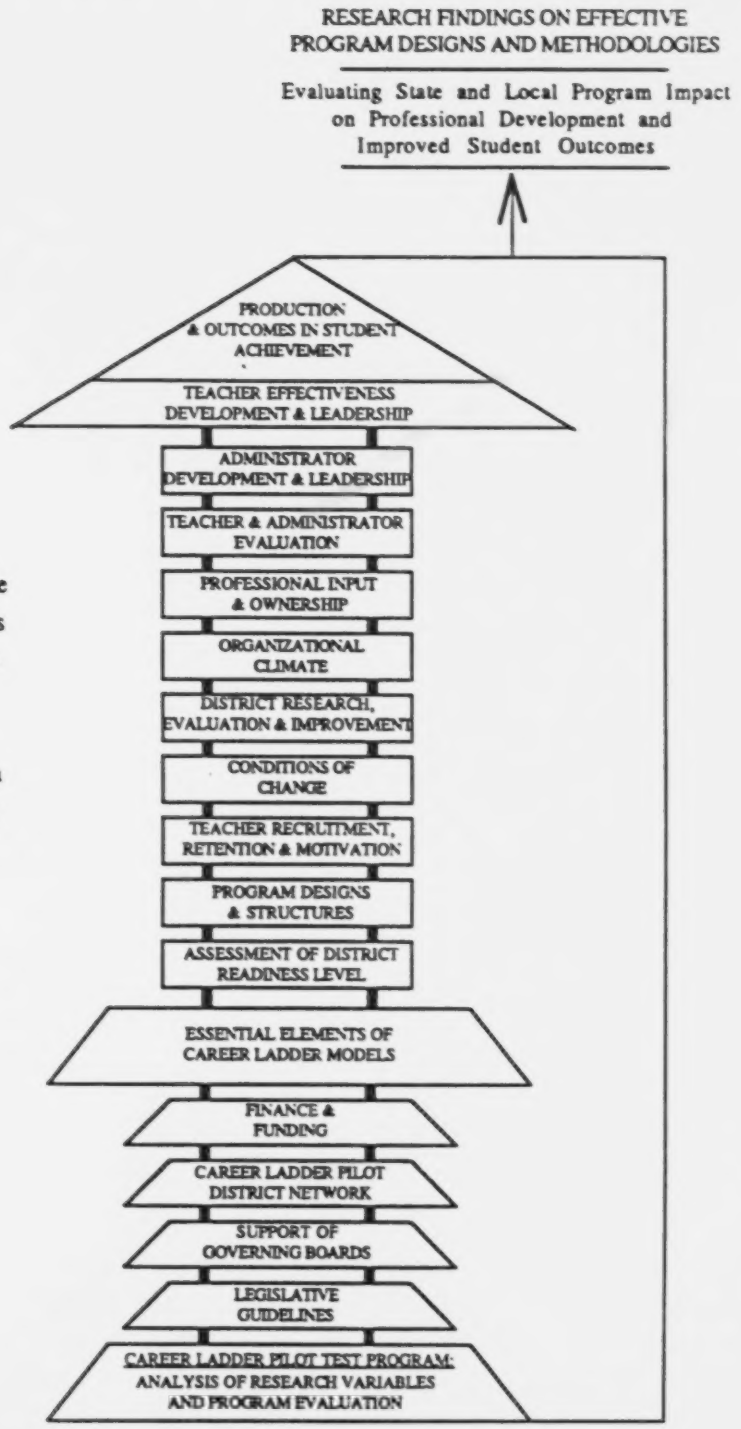
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ASSESSMENT OF DISTRICT READINESS LEVEL
ESSENTIAL ELEMENTS OF CAREER LADDER MODELS
FINANCE & FUNDING
CAREER LADDER PILOT DISTRICT NETWORK
SUPPORT OF GOVERNING BOARDS
LEGISLATIVE GUIDELINES
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A Model of Interrelated Components of Program Support and Focus

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EVALUATING STATE AND LOCAL PROGRAM IMPACT ON PROFESSIONAL DEVELOPMENT AND IMPROVED STUDENT OUTCOMES

Overview

In 1985, the Arizona Legislature established a five-year Career Ladder Pilot-Test Program for teachers. This action included formulation of the Joint Legislative Committee on Career Ladders (JLCCL), which provides oversight for program implementation and development. Basically, the purpose of the pilot is to determine if student academic achievement is enhanced through recognizing and developing high levels of teacher performance and through a "promotion system based on competence" (Lindeman, 1986, September 23).

The overall research and evaluation component, which was a formal part of the legislation, is being conducted by the Center for Excellence in Education at Northern Arizona University in cooperation with developing research functions in each of the 15 local pilot-test districts (Packard, 1987, Fall). This document explains the evolution, research methodologies, designs, models and impact which this teacher-incentive program is having on staff development and improved student outcomes. In addition, it provides actual examples of "action research & program designs" in one of the pilot districts.

Categories Crucial to Program Reform

There are several key areas which the project has identified as being crucial to program reform and success. The JLCCL and Pilot Districts have been alerted to the kinds of issues which clearly need to be addressed in program planning, implementation and development. Several reform movements in the past failed to recognize one or a combination of the areas which will be presented later; as a result, they have not survived.

The literature is replete with descriptions of former program reform movements which could have provided a professional base for future development of education and teacher leaders. However, in reviewing

their historical evolution, Packard (1987) found that "by 1980 they essentially had vacated the educational scene." (p. 3)

Freiberg & Knight (1985) have discussed the fact that in the early 1970s, the concept of differential staffing was basically abandoned and districts returned to the traditional staffing patterns of the previous years (Bierlein, 1987, pp. 43-47). From experience with programs such as the "Temple City Model," in the State of California, English & Sharpes (1972) reported positive changes for teachers in task differentiation, job recognition and career development; but there is little evidence of program continuation beyond the 1970s.

The question which arises is, "Why have these seemingly positive teacher development programs fallen into disuse?" Through literature review of other programs and data results from the Arizona pilot-test, the answer is becoming quite evident. For positive program development and continuation, there are several major interrelated areas (along with their sub-components) which the project research has identified as being predominant. These areas and their sub-components need to be studied closely and systematically by districts involved in any system-wide program change. One of the impacted areas has to do with research and evaluation, while another relates to the need for a professional intermediary between state governing bodies and school districts.

Research and Evaluation

A research and evaluation base which is focused on internal district and building-level study is essential to program change and reform. The resulting data should identify and call attention to key problems which initiate development of solutions for future progress. Packard (1987, p. 5) has reported that, "Program failures have directly been attributed to the lack of a research base. In the past, adequate collection, analysis, recording and dissemination of empirical observations were not sufficiently generated to provide evidence which would convince funding bodies to continue support."

Senator Jones Osborn, member of the Joint Legislative Committee on Career Ladders, characterized the desire of governmental leaders to gain dependable information prior to making decisions about formal program implementation. He stated that, "Districts must be willing to be a good laboratory

for research or drop out." (1986, September 23) Districts in the career ladder project are providing a good laboratory for an outside test of their programs. From present project conclusions, districts also need to be a good laboratory for their own internal research and development. Senator Osborn, and many other legislators and committee members who have forwarded the view of "objective data before decision making," should be commended for their wisdom in their approach to this very complex and comprehensive reform movement.

A Crucial Intermediary for Program Success

One of the key success factors which has been missing from past reform movements is a professional liaison or intermediary component between policy-making bodies and individual-school-district program development and implementation functions. One ingredient which is extremely positive in the teacher incentive and development program in Arizona is the establishment of the "Career Ladder Network." This network is a consortium composed of teacher and administrative leaders from each of the 15 pilot-test districts. These professional experts have served many functions and solved several problems which other reform movements in the past were unable to surmount.

Exhibit E shows a newsletter which explains many of the activities and accomplishments of the new organization. Among other advantages, the group has been able to influence better guidelines and policies formulated by governing bodies and has been of valuable assistance in interpretation of workable procedures for local district progress.

The Model of Interrelated Components of Program Support and Focus

The model which has evolved during the first three years of research and evaluation can be seen on the first page of this document. It depicts several crucial factors on the state and local district levels which must interact for the most positive support of faculty development and improved student outcomes (Packard, 1988).

In following the model from bottom to top, the first 15 components include crucial support factors, while the top two factors, in the triangle, are the model's primary focus. All of these factors must

be integrated and focused on long-range plans in order to insure successful support and improvement of staff development programs and student achievement. This involves specific attention to major conditions and structures which can allow for solutions to problems which have caused failure in past reform movements. That is, past reform movements lacked development, integration and orientation of: (1) state and local governing boards; (2) adequate finance and funding procedures; (3) long-range goals and objectives; (4) understanding possibilities for success based on readiness levels for change; (5) efficient program designs and structures; (6) conditions of organizational climate; (7) knowledgeable administrative leaders; (8) sufficient professional input and involvement of individuals and organizations; (8) relevant, fair and objective personnel evaluation; and (9) effective research and evaluation models and methodologies.

State and Local Research and Evaluation

During the first three years of the project there has been considerable definition and publication of initial developmental phases. Much information about research procedures, evaluation models and results of data analysis has been disseminated to districts, professional groups and through a variety of articles and presentations (Packard, 1986; Packard, Aleamoni, Bierlein and Helmstadter, 1986; Packard and Bierlein, 1987; Bierlein, 1987; Packard and Bierlein, 1987; Packard, 1987; Packard and Morrison, 1987). The following is a brief review of the evaluation design and predominant research methodology utilized to answer questions and guide the evaluation process on both the statewide and local district levels.

Evaluation Design. The evaluation design adopted for total program assessment during the five year pilot-test is an improvement model; therefore, as a result of feedback, districts are responsible for recycling and effecting appropriate improvements or changes. The yearly cycle of data collection, analysis, reporting and feedback begins each spring so that program changes can be evaluated. As a result of the research information, districts involved are able to use the findings in continuing to review, evaluate and improve their individual teacher development and incentive plans. The research project's trend analysis and profiling will demonstrate the direction of progress throughout the entire program period.

The local district being featured in this presentation has moved ahead rapidly in development of the support factors which provide for the continued development of instructional leadership, excellent teaching and improved learning.

Local District Program Design and Evaluation

In order to create the needed opportunities for change in the public school setting, the Sunnyside School District began developing a Career Ladder system in 1983. As a result, the District was funded as one of the original seven districts in Arizona to participate in the Career Ladder Pilot program. Full implementation began in the 1986-87 school year.

Program Goals

The goals of the plan are multi-faceted, with priority given to the following:

1. Increase student progress
2. Increase status for teachers
3. Clarify teacher expectations
4. Promote teacher growth
5. Reward quality performance
6. Increase staff unity
7. Improve and clarify teacher standards

Professional Input and Program Development

These goals were used to develop each aspect of the program. For instance, there are no quotas. Access to any level is available to all teachers if they meet the entry qualification. Also, the program has a teaming component to develop and share expertise among fellow teachers. Level III teachers have a mentoring responsibility with the Level IV teacher having a teacher training responsibility.

Development of the plan included teacher involvement and administrative input. One of its top strengths is its support and compatibility with district goals and district expectations for instruction and staff development.

The mentoring concepts and communication emphasized by the Ladder via school, district and teacher-to-teacher planning will allow teachers to influence not only their individual classrooms but the quality of district-wide instruction.

Successful learning and performance for teachers is supported by the Plan's clearly defined four-level system, with three of these levels having six steps. Performance in these levels is assessed through classroom evaluations, action plans for professional growth, evidence of student progress and Career Ladder responsibilities.

The separate but parallel career ladder salary schedule addresses the aforementioned elements of evaluation and is a performance-based compensation plan. The four career levels each have their own salary range and evaluation criteria for movement within that range.

The Career Ladder Plan not only provides for growth and incentives on the part of teachers, but is clearly intended to affect all aspects of child development and learning.

Structure for Leadership

Personnel

In the following section (Figure 1), a personnel flowchart is presented in diagrammatic form. It is accompanied by descriptions of the various levels, qualifications and responsibilities associated with each position.

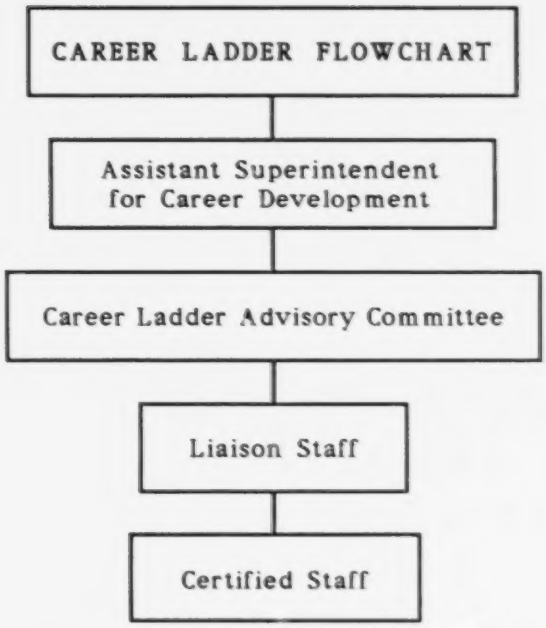

Figure 1. Structure for Leadership Personnel

A. The Assistant Superintendent for Staff Relations and Career Development is responsible for the management and organization of the Plan.

B. An Advisory Committee consisting of administrators and teachers, career ladder and non-career ladder, will assist in the planning and implementation of the Plan. These twelve individuals will represent central office and building-level administration and teachers in the elementary, middle and secondary levels. Specialists also will be represented.

C. The Committee will meet at least once each month and will be supervised by the Assistant Superintendent for Career Development. The role of the committee is to advise and assist in the areas of public relations, training, assessment, the development of evaluation tools, and program evaluation.

D. To help with communication, management and implementation, full-time staff members have been hired to work with the Assistant Superintendent for Career Development in a liaison capacity.

The purpose of these staff positions is to work directly with teachers on all phases of the Career Ladder Project. This will result in improved management, better teacher preparation and improved instruction.

Entry and Advancement Opportunities

The following is an outline of the entry-level requirements and advancement levels available to career ladder teachers in the Sunnyside School District.

Qualifications and Responsibilities

Description of Levels. The Sunnyside Career Ladder Project calls for four levels of teaching staff: Level I, Level II, Level III, and Level IV. For the 1986-87 implementation year, Levels I, II, and III were made available to staff.

All teachers new to the Sunnyside District are required to enter Level I. Level I teachers maintain their placement on the District Salary Index. (See Exhibit A, Salary Index.)

There are six steps within Levels II and III. For the 87-88 school year teachers were able to advance to Level IV. Level IV consists of two steps, an intern step and a resident step. Teachers employed during the 1985-86 school year were given an option of staying on the regular teaching salary schedule or applying to the Career Ladder Program for placement based upon specific criteria.

The following brief statements indicate the responsibilities at each level.

Level I

* Assigned to a Level III teacher in a mentoring relationship for the entire school year.
* Observes modeled teaching strategies of the mentor teacher or other designated teacher for the equivalent of one full day.
* Develops, with mentor, a Professional Growth Plan/Report of the activities involved in or planned for the current year - expected to attend pre-approved professional growth workshops, staff development activity, or approved coursework equivalent to forty five hours of instruction for each year at Level I, or a total of 135 in-service hours, or a total of 105 hours plus E.E.I.
* Three (3) additional days.
* Emphasis on classroom teaching performance.
* The third-year Level I teacher must qualify for Level II.
* Must submit a portfolio annually.

Level II

* Teamed with a Level II or III teacher for the purpose of such activities as sharing expertise or working on planning for the entire year.

* Develops a Professional Growth Resume that includes activities for skill development - expected to attend pre-approved professional growth workshops, staff development activity, or approved coursework equivalent to fifteen instructional hours each year.

* Expected to participate in at least one school or district committee or work on a curriculum development project.

* Required to show evidence of student academic progress at steps 5 and 6 or for movement to Level III.

* Expected to strive for high level of teacher performance working toward outstanding evaluations.

* No additional days required.

* Emphasis is on classroom teaching performance and sharing of expertise.

* Must submit a portfolio annually.

Level III

* Must maintain overall outstanding evaluations.

* Mentors Level I teachers and/or teams with Level II or Level III teachers throughout the year.

* Develops a Professional Growth Plan/Report.

* Takes professional growth training and staff development (courses/seminars?)

* Develops a Plan of Action for increasing student achievement .

* Is required to show evidence of student academic progress.

* Implements at least one of the following activities: plans or conducts a pre-approved district or school in-service activity; works on curriculum development projects; or serves in school (leadership role) or district-wide committees.

* Five (5) additional work days.

* Emphasis is on classroom performance, building-level responsibilities and mentoring, which includes sharing of expertise, preparation and modeling.

* Must submit a portfolio annually.

Level IV

* Must maintain overall outstanding evaluations.

* Must exhibit evidence of leadership qualities.

* Must *be capable of* (implement) teacher training(successfully).

* Must maintain a Professional Growth Activity Plan/Report.

* Must show evidence of student academic progress.
* Must develop plan of action for student academic progress (classroom or building focus).

* Select an area of focus and work with the appropriate supervisor to develop a specific plan of action, as an individual or part of a team.

* Ten (10) additional work days.

* Emphasis is on classroom performance, mentoring, and district-wide teacher training.

* Utilized as a resource dependent upon district need.

* Must submit a portfolio annually.

* Must *pass a Comprehensive Review Panel* (pass a panel test/review?)

The Utility of a Portfolio

Premise. Evaluating teachers for placement on the Career Ladder can best be accomplished through a review of a portfolio submitted by the teacher.

The Advisory Committee feels that this type of evaluation affords the best possible objective assessment of a teacher's performance and potential for success on the Career Ladder. Only that material which is requested in the portfolio is reviewed. The contents of the portfolio are to remain confidential if at all possible.

The portfolio becomes the "tool" whereby the teacher is able to show:

1. Evidence of level qualifications, training, and responsibility requirements being met.

2. Classroom performance.

3. Student academic progress.

Scoring the Portfolio. All of the above will be evaluated utilizing a Portfolio Evaluation Checklist, arriving at a specific number of points.

Each portfolio will be read by five (5) placement committee members to ensure consistency. The highest and lowest score will be dropped and the remaining three (3) scores averaged to arrive at a final score for each section. The section scores are added together to obtain a total portfolio score for placement (determination/purposes).

The following areas are addressed in each portfolio:

Level I

Focus: Classroom Performance

1. Performance evaluation
2. Evidence of observation
3. Level I report
4. Training requirement
5. Professional Growth Resume

Level II

Focus: Sharing Expertise (Teaming) and Classroom Performance

1. Performance evaluation
2. Evidence of training (15 instruction hours)
3. Professional Growth Resume
4. Teaming with Level II, III, or IV
5. Evidence of student progress (steps 5 and 6)

Optional Requirement (Select One)

* Committee (school or district)
* Curriculum development

Level III

Focus: Building Level Responsibilities, Planning for Student Progress, Teacher Training, and District Resource

1. Performance evaluation
2. Professional Growth Resume
3. Mentoring/teaming activity with Level I, II, or III
4. Plan of action for increasing student progress
5. Evidence of student progress
6. Five additional work days

Optional Requirement (Select One)

* One school or district in-service
* Committee (school/district takes active leadership role or chairmanship)
* Curriculum development

Level IV

Focus: District Level Responsibilities, Planning for Student Progress, Teacher Training, and District Resource

1. Performance evaluation
2. Professional Growth Resume
3. Mentoring/teaming activities with Levels I - III
4. Plan of action for increasing student progress classroom-building focus
5. Evidence of student progress
6. Select an area of focus and work with the appropriate supervisor to develop a specific plan of action, as an individual or part of a team

7. District Resource
    a. Plan and conduct additional school and/or district-wide in-service
    b. Other approved projects
    c. Curriculum development
    d. Assist Level III teacher in meeting requirements for entrance to Level IV
    e. Assist in evaluation of Career Ladder Project
8. Comprehensive Review Panel (new applicants only)
9. Ten additional work days

General Timeline. Portfolios are usually submitted the beginning of June, and applicants are notified of placement by July. There are generally two weeks allowed for appeals and acceptance.

Timelines for the subsequent year's placement are reviewed each fall and may be adjusted as necessary.

Evidence of Student Progress. At many of the building meetings, questions were asked regarding the most appropriate way to display student progress in the portfolio. These examples have been selected to show varying skill areas, student populations, and ways of measuring and displaying student growth. (Exhibit B, provides the type of evidence of Student Progress in Sunnyside Plan Book.)

Preliminary Evaluation of the Sunnyside Career Ladder Plan

The district's career ladder leadership and the local education association have been working closely with administration to make the most positive progress with the teacher incentive and development plan. Exhibit C shows a summary and listing of results of the local research and evaluation activities; and Exhibit D provides an expanded review of input into the evaluation by the joint efforts of the Sunnyside Career Ladder Advisory Committee and Education Association. It is interesting to note that operational procedures, results and concerns tend to be consistent with the issues of coordination and study of the overall factors shown in "A Model of Interrelated Components of Program Support and Focus" presented earlier.

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EXHIBIT A

District Salary Index and Implications

The following schedule shows the index factors which represent the percentage (%) of the base salary received at each of these levels. The base salary for both schedules is 18,387. (1988-89)

Career Ladder Salary Index Factors

Career Level	Intern	Resident
IV	2.25	2.30

Career Level	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
III	1.79	1.87	1.95	2.03	2.11	2.19
II	1.20	1.35	1.50	1.65	1.80	1.95
I	Placed on appropriate step of Regular Salary Index					

Factors relating to the Career Ladder salary index are subject to budget limitations and are based on the total amount of money available for Career Ladder increases. The actual amounts for any placement may be less than that shown on the salary index.

Regular Salary Index Factors

Step	BA	BA+15	BA+30	MA OR BA+45	MA+15	MA+30	MA+45	MA+60 PH.D. ED.D ED.S.
1	18,387							
2								
3	1.10000	1.125	1.1575	1.190	1.22250	1.250	1.28750	1.320
4	1.15748	1.190	1.2225	1.255	1.28750	1.320	1.35500	1.390
5	1.22500	1.255	1.2875	1.320	1.35500	1.390	1.42500	1.460
6	1.28750	1.320	1.3550	1.390	1.42500	1.460	1.49500	1.530
7	1.35500	1.390	1.4250	1.460	1.49500	1.530	1.56500	1.600
8	1.42500	1.460	1.4950	1.530	1.56500	1.600	1.63500	1.670
9	1.49500	1.530	1.5650	1.600	1.63500	1.670	1.70748	1.745
10	1.56500	1.600	1.6350	1.670	1.70748	1.745	1.78248	1.820
11				1.745	1.78248	1.820	1.85748	1.895
12				1.820	1.85748	1.895	1.93248	1.970
13				1.895	1.93248	1.970	2.01000	2.050

*To get the salary figure multiply factor by 18,387.

1988-89 CAREER LADDER INDEX SALARY SCHEDULE

The Career Ladder Index Salary Schedule is based on classroom performance, evidence of student progress and additional Ladder responsibilities.

Career Level	Intern	Resident
IV	41,371	42,290

Level	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
III	32,913	34,384	35,855	37,326	38,797	40,268
II	22,064	24,822	27,580	30,339	33,097	35,855

Due to the limited funding the amount of salary increase in a single year was capped. The above figures show the maximum salary at each step and level without application of the caps.

The method used to establish the maximum salary increase "cap" will be the baseline dollar figure plus a percentage of the amount between the Career Ladder placement salary and the district salary.

Baseline Dollar Figures

Level II 2,000 Level III 3,000 Level IV 4,000

REGULAR INDEX SALARY SCHEDULE

The Regular Index Salary Schedule is based on years of experience and educational units. The following schedule shows the salary received at each step and column.

Years Exper.	BA	BA-15	BA-30	MA or BA-45	MA-15	MA-30	MA-45	MA-60 Ph.D. Ed.D. Ed.S.
1.0	(18,387)							
1.5								
2.0								
2.5								
3.0	20,226	20,685	21,283	21,881	22,478	23,076	23,673	24,271
3.5	20,685	21,283	21,881	22,478	23,076	23,673	24,271	24,914
4.0	21,283	21,881	22,478	23,076	23,673	24,271	24,914	25,558
4.5	21,881	22,478	23,076	23,673	24,271	24,914	25,558	26,201
5.0	22,478	23,076	23,673	24,271	24,914	25,558	26,201	26,845
5.5	23,076	23,673	24,271	24,914	25,558	26,201	26,845	27,489
6.0	23,673	24,271	24,914	25,558	26,201	26,845	27,489	28,132
6.5	24,271	24,914	25,558	26,201	26,845	27,489	28,132	28,776
7.0	24,914	25,558	26,201	26,845	27,489	28,132	28,776	29,419
7.5	25,558	26,201	26,845	27,489	28,132	28,776	29,419	30,063
8.0	26,201	26,845	27,489	28,132	28,776	29,419	30,063	30,706
8.5	26,845	27,489	28,132	28,776	29,419	30,063	30,706	31,396
9.0	27,489	28,132	28,776	29,419	30,063	30,706	31,396	32,085
9.5	28,132	28,776	29,419	30,063	30,706	31,396	32,085	32,775
10.0	28,776	29,419	30,063	30,706	31,396	32,085	32,775	33,464
10.5				31,396	32,085	32,775	33,464	34,154
11.0				32,085	32,775	33,464	34,154	34,843
11.5				32,775	33,464	34,154	34,843	35,533
12.0				33,464	34,154	34,843	35,533	36,222
12.5				34,154	34,843	35,533	36,222	36,958
13.0				34,843	35,533	36,222	36,958	37,693

SALARY WORKSHEET

The following are examples of the new method of determining Career Ladder addendum. Remember a teacher's salary cannot exceed their Career Ladder placement (performance) salary.

C.L. Perf. Salary (Lev 3,Step 6)	-	District Salary	=	Diff.	x	10%	+	Base-Line Figure	=	C.L. Addendum	Total Salary
Example #1 Teacher A											
40,268		23,673		16,595		1,660		3,000	=	4,660	28,333
Teacher B											
40,268		35,533		4,735		474		3,000	=	3,474	39,007

C.L. Perf. Salary (Lev 3,Step 6)	-	District Salary	=	Diff.	x	05%	+	Base-Line Figure	=	C.L. Addendum	Total Salary
Example #2 Teacher A											
40,268		23,673		16,595		830		3,000	=	3,830	27,503
Teacher B											
40,268		35,533		4,735		237		3,000	=	3,237	38,770

C.L. Perf. Salary (Lev 2,Step 5)	-	District Salary	=	Diff.	x	03%	+	Base-Line Figure	=	Total C.L. Addendum	Total Salary
Example #3 Teacher A											
33,097		22,478		10,619		319		2,000	=	2,319	24,797
Teacher B											
33,097		29,419		3,678		110		2,000	=	2,110	31,529

C.L. Perf. Salary (Lev 2,Step 5)	-	District Salary	=	Diff.	x	05%	+	Base-Line Figure	=	Total C.L. Addendum	Total Salary
Example #4 Teacher A											
33,097		22,478		10,619		531		2,000	=	2,531	25,009
Teacher B											
33,097		32,085		1,012		51		961*	=	1,012	33,097

*Teacher B would not receive the full baseline figure for Level II, because a salary can not exceed their Career Ladder placement (performance) salary.

The above figures were generated from the 1988-89 Career Ladder and regular salary schedules.

SALARY IMPLICATIONS

1. A teacher who is eligible to voluntarily leave the Ladder will be placed on the Regular Index Salary Schedule at the appropriate experience and educational level.

2. A teacher, presently fulfilling Level requirements, who voluntarily chooses movement to a lower level may have a reduction in Career Ladder money. Teachers will be assigned to a step on the appropriate level for which they qualify.

3. A participant's combined district and Career Ladder salary amount cannot exceed the amount called for by their level and step placement, except if the teacher's regular index salary exceeds the Career Ladder amount, then the teacher will be entitled to keep the higher salary.

4. Teachers having an adjustment in district salary due to moving to the next column on the regular salary schedule on October 1 of the contract year, may have their Career Ladder addendum adjusted.

EXHIBIT B

Evidence of Student Progress

EVIDENCE OF STUDENT PROGRESS

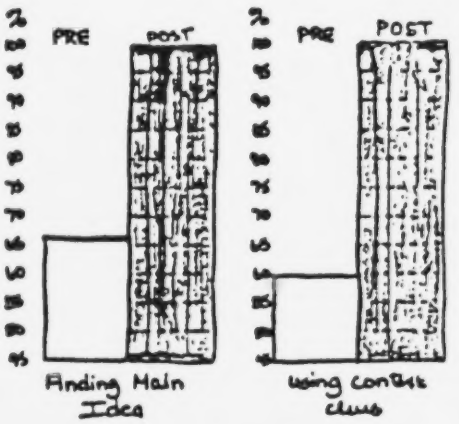
At many of the building meetings, questions have been asked regarding how to display student progress in the portfolio. These examples have been selected to show varying skill areas, student populations, and ways of measuring and displaying student growth.

Teacher A:

WHAT: Measured gain in reading skills taught during nine-week intervals when using Mastery Learning and EEI strategies

WHO: All students in regular classroom

HOW: Teacher-made fifteen-item test for each skill (used as pre and posttest) Pre/Post Comparison was displayed using teacher-made bar graphs. (District generated CRT Class Report for Reading Skills was also submitted as additional posttest data.)

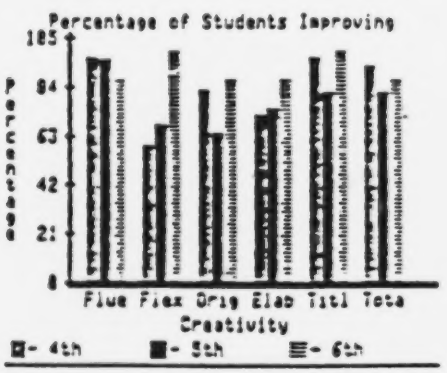


TEACHER B:

WHAT: Measure growth in elements of creative thinking after participating in a twenty-two day program

WHO: All fourth through sixth grade students in a gifted resource setting

HOW: Commercial measurement instrument was used (Exercise in Divergent Thinking) Form A = Pretest Form B = Postest Computer-generated graphs (MECC Graph Program) were used to show percent of students improving at each grade level and percentage gain for each creativity element at each grade level

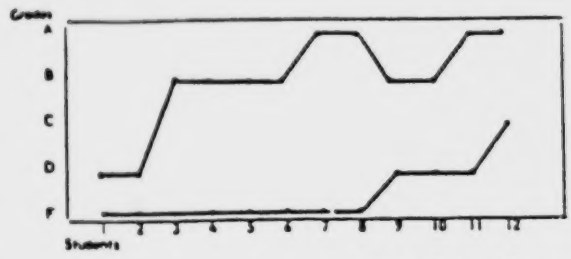


TEACHER C:

WHAT: Measured growth in student writing from beginning to ending of school by examining wholistic and analytical elements in their writing

WHO: First, second and third graders in an Extended Day Bilingual Resource classroom

HOW: Evaluated writing samples using wholistic criteria and displayed growth using a bar graph. Evaluated writing samples using analytical criteria and displayed growth using line graph. (Pre/Post indiciated using two different colored lines)



	Pre	Post
A	0%	33%
B	0%	50%
C	8%	0%
D	25%	17%
F	67%	0%

Grades Based on Points
A = 68 - 75
B = 60 - 67
C = 53 - 59
D = 45 - 52
F = 44

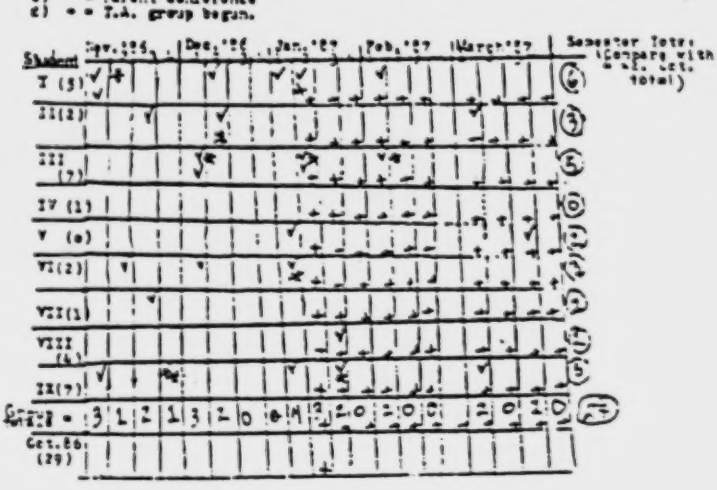
- Analytical Assessment is a two part detailed evaluation:
  1. Composing Skills—Ideas, Organization, Clarity, Complete Sentences, Flavor
  2. Mechanical Skills—Usage, Spelling, Capitalization, Punctuation, Handwriting
- 75 points possible: Composing Skills - 50 points, Mechanical Skills - 25 points.

TEACHER D:

WHAT: Measured reduction in number of student write-ups and removal from class as a result of behavioral interventions

WHO: Primary and Intermediate Emotionally-Disturbed students in self-contained setting with a high incidence of write-ups and removal (95% of class)

HOW: Chart showing number of class ejections in relation to parent conferences and intervention groups. October numbers were compared with semester total to measure reductions.

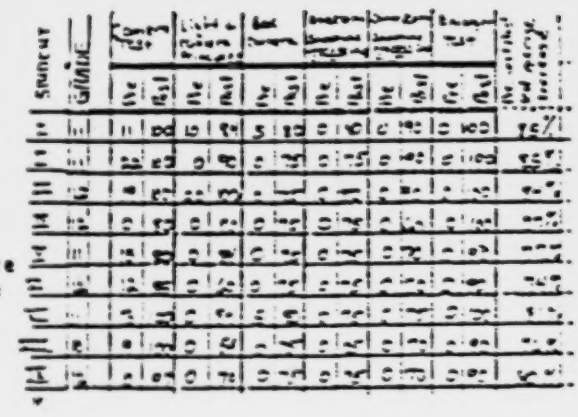


TEACHER E:

WHAT: Measured gain in photography skills through tests related to course objectives and evaluated application of course knowledge through activities and products.

WHO: Students in Photo Class, grades ten through twelve

HOW: Teacher-made tests were given before and after each activity. These test results were recorded on a chart. Percentage of increase in score was computed for each student.



Career Ladder Network News

Editor: Ms. Melinda Gonzales, phone: 741-2545
Asst. Editor: Dr. John Pedicone, phone: 887-1100 Ext. 205

CAREER LADDERS IN ARIZONA

The Arizona pilot Career Ladder project is a test of an alternative system for the professional development, recognition and compensation of teachers. The project incorporates performance-based pay into a system designed to attract and retain good teachers. Good teaching is rewarded by providing teachers with opportunities to advance professionally and to receive higher salaries through demonstration of increased teaching skills and acceptance of higher levels of professional responsibility. The project also serves to promote increased accountability in the areas of teacher performance, evaluation and student academic progress within Arizona's public school system.

While approximately 30 states are experimenting with Career Ladder type incentive programs, one feature of the Arizona project makes it unique. They were given Legislative guidelines to follow in which they had to develop a totally independent performance-based compensation plan and could not base their Career Ladder salaries on a traditional salary schedule. Other significant features of the Arizona project are:

1. The project utilizes a five year pilot model involving a small number of districts (15 districts are presently involved in the project).

2. Individual school districts develop their own programs utilizing significant teacher input within general legislative guidelines.

3. External research and evaluation is being performed by an independent and objective organization.

4. The evaluation of teachers for advancement up the Ladder must include a measure of student academic progress.

EXHIBIT C

Preliminary Evaluation of the Sunnyside Career Ladder Plan

SUNNYSIDE CAREER LADDER PLAN

Pathway to Excellence

PRELIMINARY EVALUATION

OF THE SUNNYSIDE

CAREER LADDER PLAN

Evaluation Summary

The following information is presented after two years of implementation and continued revision of the district Career Ladder Plan. This information was gathered from the Career Ladder Advisory Committee, the Liaison Staff, Administration and a survey of teachers conducted by the Sunnyside Education Association.

Even though the implementation of the Career Ladder Plan has affected the entire district, that impact was the greatest in the areas listed below.

1. Evaluation Process/Appeals
2. Staff Development
3. Administration
4. Teacher Teaming/Mentoring
5. Teacher Planning Time
6. Teacher Professionalism
7. Communication

Based on program experience, and due to the development and/or changes in the above mentioned areas, it is the leadership's recommendation that the following prerequisites be in place prior to the implementation of a career ladder plan.

1. Funding
2. Staff Development Plan
3. Evaluation Process
4. Communication System for Teacher Input
5. Teacher Association Support and Involvement

<u>Teachers are concerned about the following aspect of the plan:</u>

1. Additional responsibilities
2. Equal pay for equal performance
3. Evaluation inconcsistencies
4. Balance between school and career ladder responsibilities
5. Communication of expectations
6. Disclosure of complete budget
7. Salary caps
8. Opposition to peer evaluation

<u>Teachers feel positive about the following aspects of the plan:</u>

1. Monetary rewards are significant incentive
2. Teachers can be flexible in showing student progress
3. Mentoring and teaming aspects are rewarding
4. Teachers have a adequate input into the plan and all changes
5. The plan encourages sharing among colleagues
6. Every teacher can move to the top of the ladder if they choose
7. A teacher can reach the highest level of the ladder and remain in the classroom
8. Ladder goals and objectives are clearly communicated
9. A communication system has been established to disseminate information

EXHIBIT D

Sunnyside Career Ladder
Advisory Committee
and Education Association
Summary of Concerns

NEWSLETTER

SUNNYSIDE CAREER LADDER PLAN

Pathway to Excellence

APRIL 1988

SPECIAL EDITION

SUNNYSIDE CAREER LADDER ADVISORY COMMITTEE

RECOMMENDATIONS

BASED UPON

SUNNYSIDE EDUCATION ASSOCIATION

PRIORITIZED LIST OF CAREER LADDER CONCERNS

The Career Ladder Advisory Committee and Staff wishes to take this opportunity to thank those teachers who took the time to respond to the SEA Survey. Our Career Ladder Plan continues to improve because of changes that are made to address the concerns and suggestions received from teachers and administrators in our district. Your input is valued.

Prioritized List of Concerns and Responses

CONCERN #1 CAREER LADDER REQUIREMENTS AND RESPONSIBILITIES

(WORKSHOPS, MEETINGS, ADMINISTRATIVE COMMITTEE WORK RESPONSIBILITIES)

RATIONALE:
The Professional Growth section of the portfolio allows teachers to list professional and personal growth and accomplishments. Workshops and inservices are given Career Ladder approval if they pertain to students, student achievement or other areas related to the professional needs of teachers. Teachers view themselves as professionals and must keep abreast of current methods, trends and research. The Career Ladder allows teachers to receive credit and monetary compensation for maintaining and upgrading their professional status.

RECOMMENDATIONS:
The Career Ladder Advisory Committee has made an attempt to reduce stress by clarifying level requirements along with some minor changes in the portfolio scoring process, clearly placing the emphasis on the quality of the teachers involvement rather than the quantity. These changes will allow a teacher to receive full points for one option in the Optional Requirement section and full points for mentoring or teaming (if not assigned a protege) in the mentoring section. Not only does this place the proper emphasis on the goals of our plan, but clearly defines Career Ladder expectations so a teacher does not feel they must "do it all" in order to receive maximum points.

Upon close examination and communication with teachers the Career Ladder Advisory Committee and staff realize that many teachers are over extended with District and or building level responsibilities which are not requirements of the Career Ladder Plan. The Career Ladder does allow teachers to receive Career Ladder credit for the above responsibilities and provides staff with the opportunity to choose areas of growth and responsibility.

The Career Ladder Advisory Committee will continue their attempt to coordinate and integrate Career Ladder requirements and responsibilities with district and building requirements and responsibilities. For example teachers may receive Career Ladder credit for assessing, developing, and implementing school effectiveness plans or coordinating and aligning district curriculum. These items may be listed under Committee Work, Curriculum Development, or Plan of Action sections of the portfolio depending upon the role and emphasis taken by the teacher. The above example is only one way that the Career Ladder Advisory Committee has attempted to integrate Career Ladder requirements and responsibilities.

CONCERN #2 EQUAL PAY FOR EQUAL PERFORMANCE

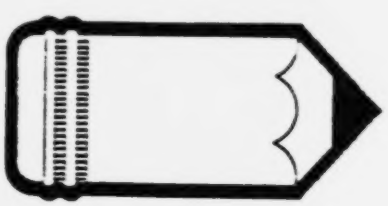
RATIONALE:
The Career Ladder program is a performance based compensation plan. Individuals who do not accept the premise "Equal pay for Equal performance" will in all likelihood not support any aspect of the Career Ladder Plan.

In an attempt to keep good and talented teachers and at the same time attract new people to the teaching profession it has become necessary to address the track record of poor career earnings in education. In the past, it might

take a teacher anywhere from 15 to 20 years to reach the top of a salary schedule. With the Career Ladder program a teacher can now reach the "top" or higher levels of the salary schedule in a much shorter period of time as long as they are doing an outstanding job in the classroom and fulfilling the additional responsibilities that their level requires. As professionals we must ask ourselves: Is it fair to deny new or less experienced teachers an opportunity which we may not have had? Equal pay for equal performance is a piloted concept intended to positively impact our public school system.

Another aspect to be considered is the fact that the public (legislators included) is looking for accountability. In the past several years any money given to teachers has had "strings" attached. The Career Ladder and Proposition 101 monies are a good example. Everything indicates that this national trend will continue. Having a Career Ladder plan that we were able to write and implement for our district is a good hedge against any future moves to impose a state wide merit pay system based on limited measurability.

RECOMMENDATIONS:
Unlike many Career Ladder Plans throughout the state Sunnyside's Career Ladder Plan is a voluntary program. The Career Ladder Advisory Committee recently changed the Plan to allow teachers who reach Level II and continuing teacher status to leave the Career Ladder Plan.



CONCERN #3 SCHOOL IMPROVEMENT PLANS AS RELATED TO CAREER LADDER PLAN

RATIONALE:
Individual school improvement plans have been and will continue to be valued by the Career Ladder plan. Teachers may incorporate their building improvement plan into their own plans of action or serve on school committees related to the school improvement programs. The Career Ladder project and school improvement plans are a "natural" together.

RECOMMENDATIONS:
The Career Ladder Advisory Committee will continue their attempt to integrate the Career Ladder Plan with district goals and building programs.

CONCERN #4 EVALUATION INCONSISTENCIES

RATIONALE:
The District adopted a new evaluation policy to be implemented during the 87-88 school year. A portion of that policy requires building evaluators to discuss with their staff their interpretation of the Performance Evaluation instrument and to hold a building inservice on the process. All evaluators have attended a two day workshop on evaluation and the district intends to continue to strive for consistency in evaluation by providing the necessary training for its evaluators. More than at any other time, there exists more specific criteria and definition of the categories in the instrument.

RECOMMENDATIONS:
It is recommended that district evaluation data be examined on a regular basis to identify any inconsistencies that may exist. The Career Ladder Advisory Committee through its Liaison Staff has analyzed district wide evaluation scores and Mr. Fimbres has shared its findings with district evaluators.

CONCERN #5 COMMUNICATION WITH STAFF REGARDING CAREER LADDER EXPECTATIONS

RATIONALE:
The Career Ladder Advisory Committee recognizes the importance and benefit of communication to the success of any plan. Expectations are now clearly defined and communicated through the Career Ladder Newsletter, Career Ladder Bulletin Boards, new Career Ladder Handbook, new Career Ladder Portfolio, Career Ladder Key Communicators, district-wide meetings and school meetings.

RECOMMENDATIONS:
The Career Ladder Advisory Committee, through the liaison staff, will continue with input from teachers to refine and communicate Career Ladder expectations.

CONCERN #6 DISCLOSURE OF CAREER LADDER BUDGET

RATIONALE:
In the past the Career Ladder Advisory Committee has released information concerning the budget and use of Career Ladder monies. For example, the first year of the Plan (1986-87) 92% of the total monies went into teacher's salaries. The second year (1987-88) 89% of total monies went to teacher's salaries with a greater percentage needed for supplies, staff development and administrative costs. A significantly higher percentage of money has gone to teacher salaries in the Sunnyside Plan than in any other Plan statewide.

RECOMMENDATIONS:
The Career Ladder Liaison staff will publish a break down of the budget to appear in a future issue of the Career Ladder Newsletter.

CONCERN # 7 INADEQUATE CAREER LADDER FUNDING FROM THE STATE (LARGE NUMBER OF SUNNYSIDE PARTICIPANTS VS PROJECTED SALARIES HAS NECESSITATED USE OF CAPS)

RATIONALE:
The Career Ladder staff and Career Ladder staffs from other districts have lobbied and will continue to lobby the Joint Legislative Committee on Career Ladders to change the funding formula from student count to the number of teachers participating in the Plan. Many members of the JLCCL now realize the funding formula should be based upon participation. However, at this point new legislation has not been introduced.

RECOMMENDATIONS:
The liaison staff will continue to communicate and lobby the JLCCL on our needs and concerns. (Through the Career Ladder Network Committee and a new legislative task force that has been formed).

The Career Ladder Advisory Committee will consider a new method of allocating caps because of the concern and recommendations expressed by teachers that is consistent with responsibility and performance.

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The Career Ladder Advisory Committee will consider a new method of allocating caps because of the concern and recommendations expressed by teachers that is consistent with responsibility and performance.

CONCERN #8 OPPOSITION TO THE CONCEPT OF PEER EVALUATION

RATIONALE:
Unlike many Career Ladder plans throughout the state, Sunnyside's Career Ladder plan does not utilize peer evaluation because of initial input from teachers and administrators stating their opposition.

RECOMMENDATIONS:
The Career Ladder Advisory Committee through its Liaison staff have emphasized to all building administrators that mentor teachers are not to be involved in any aspect of the evaluation process. The Career Ladder Advisory Committee does support the concept of peer-coaching and the utilization of Career Ladder mentors in helping Level I teachers with self-evaluation in lieu of peer evaluation.

<u>THE FOLLOWING STATEMENTS ADDRESS ADDITIONAL CONCERNS EXPRESSED BY SEA</u>

A. Publishing changes to the Career Ladder Plan
As the Advisory Committee makes changes in the Plan new pages have been and will continue to be sent to all Career Ladder participants, administrators and non-Ladder teachers who have expressed a desire to receive Career Ladder information.

B. Portfolios need to be made available at the beginning of the school year
This year for the first time, portfolios were distributed prior to Winter break. The Advisory Committee realizes the importance of getting portfolios to teachers at the earliest possible date. It is important to keep in mind that in order to improve the portfolio process, some time is necessary at the beginning of each year to review and finalize the recommended changes made by teachers and the portfolio readers.

C. Building administrators should provide written definitions of their expectations for Outstanding, Competent, Needs Improvement and Unsatisfactory Performance based on the district's performance evaluation criteria
Mr. Fimbres has encouraged administrators to make clear their expectations and interpretations of the written criteria and definitions in the instrument. Teachers that are unclear regarding specific areas should check with the administrator. Administrators will be attending follow up training through the Qualified Evaluator's Institute which will further refine and clarify the evaluation process.

The majority of teachers responding to the SEA Survey either agreed or strongly agreed with the following statements:

FUNDING
Monetary rewards available through Career Ladder are a significant incentive.

STUDENT ACHIEVEMENT
The Sunnyside Plan allows for teacher flexibility in showing student progress.

PEER MENTORING
Mentoring and teaming aspects of our plan are rewarding.

TEACHER SUPPORT
The district has established a means of adequate teacher input concerning possible revisions.

ENVIRONMENTAL FACTORS
The Career Ladder encourages sharing and teaming among colleagues for the benefit of students.

The plan allows every teacher to move up the ladder if they choose to do so.

A teacher can remain in the classroom and reach the top levels of the Career Ladder plan.

COMMUNICATION
The district's Career Ladder goals and objectives have been clearly communicated to teachers.

Teachers clearly understand what is expected of them in order to advance on the Ladder.

A communication system has been established to disseminate information.

Teachers are made aware of changes in the plan.

EXHIBIT E

Pilot District
Network
Newsletter

SUNNYSIDE CAREER LADDER PLAN

Pathway to Excellence

CAREER LADDER

PILOT DISTRICT
NETWORK
NEWSLETTER

Since each district's Career Ladder program was developed locally, Arizona now has 15 unique Career Ladder programs in operation. These districts are monitored by the Joint Legislative Committee on Career Ladders.

The following are the Career Ladder Pilot Districts:

Phase I (1984)
Amphitheater Unified, (Tucson)
Apache Junction Unified, (Apache Junction)
Cave Creek Unified, (Cave Creek)
Flowing Wells Unified, (Tucson)
Kyrene Elementary, (Tempe)
Peoria Unified, (Peoria)
Sunnyside Unified, (Tucson)

Phase II (1986)
Catalina Foothills Unified, (Tucson)
Mesa Unified, (Mesa)
Window Rock Unified, (Window Rock)

Phase III (1987)
Creighton Elementary, (Phoenix)
Dysart Unified, (Peoria)
Fountain Hills Elementary, (Fountain Hills)
Ganado Unified, (Ganado)
Litchfield Elementary, (Litchfield Park)

In September 1987, thirteen of fifteen Career Ladder districts met to form a state-wide network. Since that time, the Network Committee has met on a monthly basis to accomplish the following objectives:

1. Act as a clearing house for information about career ladders.
2. Monitor legislative activity that relates to career ladders.
3. Recommend legislative changes in statutes and guidelines when deemed appropriate by the majority of participants.
4. Raise the public's awareness of the Arizona Career Ladder program.
5. Collect data for research purposes.

The Network is chaired by Virginia Guy of Mesa, and Susan Stropko of Ganado serves as treasurer. Three sub-committees: Legislative, Public Awareness, and Research, were established in order to achieve the above mentioned objectives. They will begin to lay the ground work necessary for the Network to become a recognized force in future career ladder legislation and possible state-wide implementation.

In addition to these sub-committees, a legislative task force was created with ten members representing the Network Committee. The following names were submitted to the Joint Legislative Committee on Career Ladders (JLCCL) by the Network. Three will be selected to serve with members of the JLCCL on a legislative task force. This task force will address legislative concerns and changes facing the Career Ladder Program in the years to come.

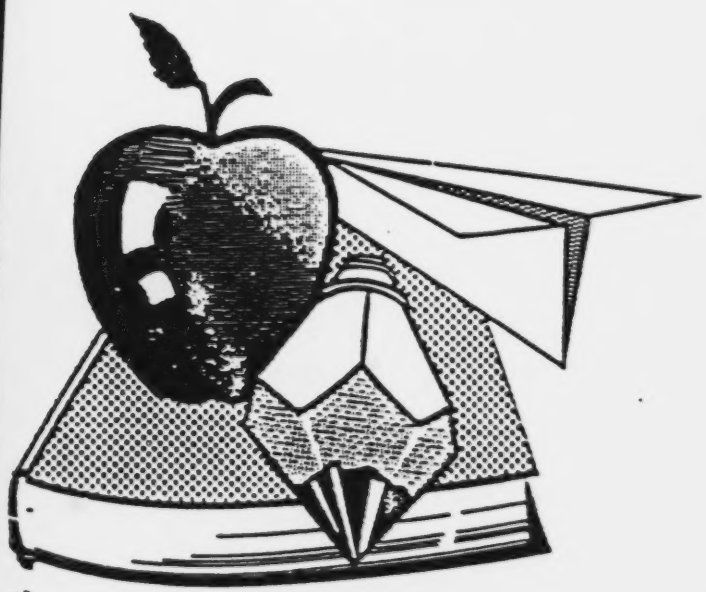
Chris Beatty-Apache Junct.
Ernie Fimbres-Sunnyside
Melinda Gonzales-Sunnyside
Virginia Guy-Mesa
Gary Mangin-Peoria
Ann Murphy-Dyrene
Mark Pope-Roleswki-Amphi (Chair)
Lewis Smith-Cave Creek
Susan Stropko-Ganado
Larry Watson-Window Rock

A2

At the request of the JLCCL the Network Legislative Task Force has been meeting on a regular basis to prepare a position statement on the ten issues listed below:

1. Definition of "statewide" Career Ladder Program
2. Formula for allocating monies to districts and possible limits on the use of career ladder monies
3. Salary system requirements
4. Criteria for advancement, including student achievement
5. Use of career development model
6. Inclusion of non-classroom personnel
7. Requirements regarding participation of new teachers in the program
8. Use of models for additional districts
9. State-wide and individual district research components
10. Program evaluation

The way these issues are addressed will have a tremendous impact on the future implementation of career ladder plans in our State. Network Committee members feel our input is critical.



Career Ladder Network

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Teacher Liaison
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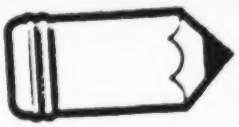
Office: (602) 741-2545 Home: (602) 297-8150



JOINT LEGISLATIVE COMMITTEE ON CAREER LADDERS

STATE BOARD OF EDUCATION

1984

PHASE I

AMPHITHEATER
APACHE JUNCTION
CAVE CREEK
FLOWING WELLS
KYRENE
PEORIA
SUNNYSIDE

1986

PHASE II

CATALINA
MESA
WINDOW ROCK

1987

PHASE III

CREIGHTON
DYSART
FOUNTAIN HILLS
GANADO
LITCHFIELD PARK

NAU RESEARCH

DIRECTOR
Dr. Richard Packard

1987

CAREER LADDER PILOT DISTRICT NETWORK

PUBLIC AWARENESS

CHAIRPERSON
Melinda Gonzales
Sunnyside

RESEARCH

CHAIRPERSON
Mark Pope-Rolewski
Amphitheater

LEGISLATIVE

CO-CHAIRPERSON
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Ann Murphy-Kyrene

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Ann Murphy
Mark Pope-Rolewski (Chair)
Lewis Smith
Susan Stropko
Larry Watson